

State of Hawaii  
Department of Human Services  
Benefit, Employment & Support Services Division  
Child Care Program Office

**Request for Proposals**

**HMS-302-11-01-S**

**Child Care Advocacy and Facilitation**

November 29, 2010

Note: If this RFP was downloaded from the State Procurement Office RFP Website each applicant must provide contact information to the RFP contact person for this RFP to be notified of any changes. For your convenience, you may download the RFP Interest form, complete and e-mail or mail to the RFP contact person. The State shall not be responsible for any missing addenda, attachments or other information regarding the RFP if a proposal is submitted from an incomplete RFP.

LINDA LINGLE  
GOVERNOR



LILLIAN B. KOLLER, ESQ.  
DIRECTOR


HENRY OLIVA  
DEPUTY DIRECTOR

STATE OF HAWAII  
DEPARTMENT OF HUMAN SERVICES  
Benefit, Employment and Support Services Division  
820 Mililani Street, Suite 606  
Honolulu, Hawaii 96813

November 29, 2010

MEMORANDUM

To: All Interested Applicants

From: Lillian B. Koller, Director 

SUBJECT: CHILD CARE ADVOCACY AND FACILITATION  
Request For Proposals (RFP) HMS-302-11-01-S

The Department of Human Services, Benefit, Employment and Support Services Division, Child Care Program Office, is requesting proposals from qualified applicants to assist the department in monitoring and facilitating the creation and implementation of an Early Learning System for children, ages 0 to 5 years old, so they are safe, healthy, and ready to learn. Services may include, but are not limited to the following:

1. Monitoring national trends in policies, funding initiatives, etc. as it relates to young children's well-being and success in school, and exchanging that type of information with stakeholders in the early learning community; and,
2. Facilitating policy development, and increased public awareness of early learning, by providing to the Department reports of national and local data and research.

The contract term will be from January 1, 2011 through June 30, 2011, with the option to extend for one additional year to June 30, 2012.

Proposals shall be mailed, postmarked by the United States Postal Service on or before **December 27, 2010**, and received no later than 10 days from the submittal deadline. Hand delivered proposals shall be received no later than 4:30 p.m., Hawaii Standard Time (HST), on **December 27, 2010**, at the drop-off sites designated on the Proposal Mail-in and Delivery Information Sheet. Proposals postmarked or hand delivered after the submittal deadline shall be considered late and rejected. There are no exceptions to this requirement.

The Child Care Program Office will conduct an **orientation on December 3, 2010 from 1:00 p.m. to 3:00 p.m. HST**, at 820 Mililani Street, Suite 606, Honolulu, Hawaii. All prospective applicants are encouraged to attend the orientation.

Inquiries regarding this RFP should be directed to the RFP contact person, Ms. Marja Leivo at 820 Mililani Street, Suite 606, Honolulu, Hawaii 96813, telephone: (808) 586-7112, fax: (808) 586-5744, e-mail: [mleivo@dhs.hawaii.gov](mailto:mleivo@dhs.hawaii.gov).

## PROPOSAL MAIL-IN AND DELIVERY INFORMATION SHEET

<b>NUMBER OF COPIES TO BE SUBMITTED: One (1) original and three (3) copies</b>
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ALL MAIL-INS SHALL BE POSTMARKED BY THE UNITED STATES POSTAL SERVICE (USPS) NO LATER THAN **December 27, 2010** and received by the state purchasing agency no later than **10 days from the submittal deadline.**

### All Mail-ins

Department of Human Services  
Benefit, Employment & Support Services Division  
Child Care Program Office  
820 Mililani Street, Suite 606  
Honolulu, HI 96813

### DHS RFP COORDINATOR

Marja Leivo  
Phone: (808) 586-7112  
Email: mleivo@dhs.hawaii.gov

ALL HAND DELIVERIES SHALL BE ACCEPTED AT THE FOLLOWING SITES UNTIL **4:30 P.M., Hawaii Standard Time (HST), December 27, 2010.** Deliveries by private mail services such as FEDEX shall be considered hand deliveries. Hand deliveries shall not be accepted if received after 4:30 p.m., **December 27, 2010.**

### Drop-off Sites

#### Oahu:

Department of Human Services  
Benefit, Employment & Support Services Division  
Child Care Program Office  
820 Mililani Street, Suite 606  
Honolulu, HI 96813

#### Maui:

Department of Human Services  
Benefit, Employment & Support Services Division  
Maui Section  
Waiehu Beach Road, Suite 107  
Wailuku, HI 96793

#### East Hawaii:

Department of Human Services  
Benefit, Employment & Support Services Division  
East Hawaii Section  
1990 Kinoole Street  
Hilo, HI 96720

#### Kauai:

Department of Human Services  
Benefit, Employment & Support Services Division  
Kauai Section  
Dynasty Court  
4473 Pahee Street, Suite G  
Lihue, HI 96766

#### West Hawaii:

Department of Human Services  
Benefit, Employment & Support Services Division  
West Hawaii Section  
Kona Center  
75-5722 Hanama Place, Suite 1105  
Kailua-Kona, HI 96740

## RFP Table of Contents

### Section 1 Administrative Overview

I.	Procurement Timetable.....	1-1
II.	Website Reference .....	1-2
III.	Authority.....	1-2
IV.	RFP Organization .....	1-3
V.	Contracting Office .....	1-3
VI.	Orientation .....	1-3
VII.	Submission of Questions .....	1-4
VIII.	Submission of Proposals.....	1-4
IX.	Discussions with Applicants.....	1-7
X.	Opening of Proposals .....	1-7
XI.	Additional Materials and Documentation .....	1-7
XII.	RFP Amendments.....	1-7
XIII.	Final Revised Proposals .....	1-7
XIV.	Cancellation of Request for Proposals.....	1-8
XV.	Costs for Proposal Preparation .....	1-8
XVI.	Provider Participation in Planning.....	1-8
XVII.	Rejection of Proposals .....	1-8
XVIII.	Notice of Award .....	1-9
XIX.	Protests .....	1-9
XX.	Availability of Funds.....	1-10
XXI.	General and Special Conditions of the Contract .....	1-10
XXII.	Cost Principles.....	1-10

### Section 2 - Service Specifications

I.	Introduction	
A.	Overview, Purpose or Need .....	2-1
B.	Planning activities conducted in preparation for this RFP .....	2-1
C.	Description of the Goals of the Service .....	2-1
D.	Description of the Target Population to be Served.....	2-1
E.	Geographic Coverage of Service .....	2-2
F.	Probable Funding Amounts, Source, and Period of Availability .....	2-2
II.	General Requirements .....	2-2
A.	Specific Qualifications or Requirements .....	2-2
B.	Secondary Purchaser Participation .....	2-2
C.	Multiple or Alternate Proposals.....	2-2
D.	Single or Multiple Contracts to be Awarded .....	2-2
E.	Single or Multi-Term Contracts to be Awarded .....	2-3
F.	RFP Contact Person .....	2-3

III.	Scope of Work .....	2-3
A.	Service Activities .....	2-3
B.	Management Requirements .....	2-4
C.	Facilities .....	2-6
IV.	Compensation and Method of Payment.....	2-6

### **Section 3 - Proposal Application Instructions**

	General Instructions for Completing Applications .....	3-1
I.	Program Overview .....	3-1
II.	Experience and Capability .....	3-2
A.	Necessary Skills .....	3-2
B.	Experience .....	3-2
C.	Quality Assurance and Evaluation .....	3-2
D.	Coordination of Services .....	3-2
E.	Facilities .....	3-2
III.	Project Organization and Staffing .....	3-3
A.	Staffing .....	3-3
B.	Project Organization .....	3-3
IV.	Service Delivery .....	3-3
V.	Financial .....	3-4
A.	Pricing Structure .....	3-4
B.	Other Financial Related Materials .....	3-5
VI.	Other .....	3-5
A.	Litigation .....	3-5

### **Section 4 – Proposal Evaluation**

I.	Introduction .....	4-1
II.	Evaluation Process .....	4-1
III.	Evaluation Criteria .....	4-1
A.	Phase 1 – Evaluation of Proposal Requirements .....	4-1
B.	Phase 2 – Evaluation of Proposal Application .....	4-2
C.	Phase 3 – Recommendation for Award .....	4-4

### **Section 5 – Attachments**

Attachment A. Competitive Proposal Application Checklist

Attachment B. Sample Proposal Table of Contents

# **Section 1**

## **Administrative Overview**

# Section 1

## Administrative Overview

**Applicants are encouraged to read each section of the RFP thoroughly. While sections such as the administrative overview may appear similar among RFPs, state purchasing agencies may add additional information as applicable. It is the responsibility of the applicant to understand the requirements of *each* RFP.**

### I. Procurement Timetable

**Note that the procurement timetable represents the State's best estimated schedule. Contract start dates may be subject to the issuance of a notice to proceed.**

<u>Activity</u>	<u>Scheduled Date</u>
Public notice announcing Request for Proposals (RFP)	11-29-2010
Distribution of RFP	11-29-2010
RFP orientation session	12-03-2010
Closing date for submission of written questions for written responses	12-08-2010
State purchasing agency's response to applicants' written questions	12-13-2010
Discussions with applicant prior to proposal submittal deadline (optional)	11-29-2010 – 12-22-2010
Proposal submittal deadline	12-27-2010
Discussions with applicant after proposal submittal deadline (optional)	12-27-2010
Final revised proposals (optional)	12-27-2010
Proposal evaluation period	12-28-2010 – 12-30-2010
Provider selection	12-28-2010 – 12-30-2010
Notice of statement of findings and decision	12-29-2010 – 12-30-2010
Contract start date	01-01-2011

## II. Website Reference

The State Procurement Office (SPO) website is <http://hawaii.gov/spo/>

For	Click
1 Procurement of Health and Human Services	"Health and Human Services, Chapter 103F, HRS..."
2 RFP website	"Health and Human Services, Ch. 103F..." and "The RFP Website" (located under Quicklinks)
3 Hawaii Administrative Rules (HAR) for Procurement of Health and Human Services	"Statutes and Rules" and "Procurement of Health and Human Services"
4 Forms	"Health and Human Services, Ch. 103F..." and "For Private Providers" and "Forms"
5 Cost Principles	"Health and Human Services, Ch. 103F..." and "For Private Providers" and "Cost Principles"
6 Standard Contract -General Conditions	"Health and Human Services, Ch. 103F..." "For Private Providers" and "Contract Template – General Conditions"
7 Protest Forms/Procedures	"Health and Human Services, Ch. 103F..." and "For Private Providers" and "Protests"

### Non-SPO websites

(Please note: website addresses may change from time to time. If a link is not active, try the State of Hawaii website at <http://hawaii.gov>)

For	Go to
8 Tax Clearance Forms (Department of Taxation Website)	<a href="http://hawaii.gov/tax/">http://hawaii.gov/tax/</a> click "Forms"
9 Wages and Labor Law Compliance, Section 103-055, HRS, (Hawaii State Legislature website)	<a href="http://capitol.hawaii.gov/">http://capitol.hawaii.gov/</a> click "Bill Status and Documents" and "Browse the HRS Sections."
10 Department of Commerce and Consumer Affairs, Business Registration	<a href="http://hawaii.gov/dcca">http://hawaii.gov/dcca</a> click "Business Registration"
11 Campaign Spending Commission	<a href="http://hawaii.gov/campaign">http://hawaii.gov/campaign</a>

## III. Authority

This RFP is issued under the provisions of the Hawaii Revised Statutes (HRS) Chapter 103F and its administrative rules. All prospective applicants are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective applicant shall constitute admission of such knowledge on the part of such prospective applicant.



#### IV. RFP Organization

This RFP is organized into five sections:

***Section 1, Administrative Overview:*** Provides applicants with an overview of the procurement process.

***Section 2, Service Specifications:*** Provides applicants with a general description of the tasks to be performed, delineates provider responsibilities, and defines deliverables (as applicable).

***Section 3, Proposal Application Instructions:*** Describes the required format and content for the proposal application.

***Section 4, Proposal Evaluation:*** Describes how proposals will be evaluated by the state purchasing agency.

***Section 5, Attachments:*** Provides applicants with information and forms necessary to complete the application.

#### V. Contracting Office

The Contracting Office is responsible for overseeing the contract(s) resulting from this RFP, including system operations, fiscal agent operations, and monitoring and assessing provider performance. The Contracting Office is:

Department of Human Services  
Benefit, Employment & Support Services Division  
Child Care Program Office  
820 Mililani Street, Suite 606  
Honolulu, HI 96813  
Phone: (808) 586-7112 Fax: (808) 586-5744

#### VI. Orientation

An orientation for applicants in reference to the request for proposals will be held as follows:

**Date:** December 3, 2010 **Time:** 1:00 p.m. to 3:00 p.m.  
**Location:** 820 Mililani St., Ste. 606, Honolulu, HI 96813

Applicants are encouraged to submit written questions prior to the orientation. Impromptu questions will be permitted at the orientation and spontaneous answers provided at the state purchasing agency's discretion. However, answers provided at the orientation are only intended as general direction and may not represent the state purchasing agency's position. Formal official responses will be provided in writing. To ensure a written response, any oral

questions should be submitted in writing following the close of the orientation, but no later than the submittal deadline for written questions indicated in the paragraph VII. Submission of Questions.

## **VII. Submission of Questions**

Applicants may submit questions to the RFP Contact Person identified in Section 2 of this RFP. All written questions will receive a written response from the state purchasing agency.

Deadline for submission of written questions:

**Date:** December 8, 2010      **Time:** 4:30 p.m. HST

State agency responses to applicant written questions will be provided by:

**Date:** December 13, 2010

## **VIII. Submission of Proposals**

A. **Forms/Formats** - Forms, with the exception of program specific requirements, may be found on the State Procurement Office website referred to in II. Website Reference. Refer to the Proposal Application Checklist for the location of program specific forms.

1. **Proposal Application Identification (Form SPO-H-200).** Provides applicant proposal identification.
2. **Proposal Application Checklist.** Provides applicants with information on where to obtain the required forms; information on program specific requirements; which forms are required and the order in which all components should be assembled and submitted to the state purchasing agency.
3. **Table of Contents.** A sample table of contents for proposals is located in Section 5, Attachments. This is a sample and meant as a guide. The table of contents may vary depending on the RFP.
4. **Proposal Application (Form SPO-H-200A).** Applicant shall submit comprehensive narratives that address all of the proposal requirements contained in Section 3 of this RFP, including a cost proposal/budget if required.

B. **Program Specific Requirements.** Program specific requirements are included in Sections 2, Service Specifications and Section 3, Proposal Application Instructions, as applicable. If required, Federal and/or State

certifications are listed on the Proposal Application Checklist located in Section 5.

- C. **Multiple or Alternate Proposals.** Multiple or alternate proposals shall not be accepted unless specifically provided for in Section 2 of this RFP. In the event alternate proposals are not accepted and an applicant submits alternate proposals, but clearly indicates a primary proposal, it shall be considered for award as though it were the only proposal submitted by the applicant.
  
- D. **Tax Clearance.** Pursuant to HRS Section 103-53, as a prerequisite to entering into contracts of \$25,000 or more, providers shall be required to submit a tax clearance certificate issued by the Hawaii State Department of Taxation (DOTAX) and the Internal Revenue Service (IRS). The certificate shall have an original green certified copy stamp and shall be valid for six (6) months from the most recent approval stamp date on the certificate. Tax clearance applications may be obtained from the Department of Taxation website. (Refer to this section's part II. Website Reference.)
  
- E. **Wages and Labor Law Compliance.** If applicable, by submitting a proposal, the applicant certifies that the applicant is in compliance with HRS Section 103-55, Wages, hours, and working conditions of employees of contractors performing services. Refer to HRS Section 103-55, at the Hawaii State Legislature website. (See part II, Website Reference.)
  
- **Compliance with all Applicable State Business and Employment Laws.** All providers shall comply with all laws governing entities doing business in the State. Prior to contracting, owners of all forms of business doing business in the state except sole proprietorships, charitable organizations unincorporated associations and foreign insurance companies be registered and in good standing with the Department of Commerce and Consumer Affairs (DCCA), Business Registration Division. Foreign insurance companies must register with DCCA, Insurance Division. More information is on the DCCA website. (See part II, Website Reference.)
  
- F. **Hawaii Compliance Express (HCE).** Providers may register with HCE for online proof of DOTAX and IRS tax clearance Department of Labor and Industrial Relations (DLIR) labor law compliance, and DCCA good standing compliance. There is a nominal annual fee for the service. The "Certificate of Vendor Compliance" issued online through HCE provides the registered provider's current compliance status as of the issuance date, and is accepted for both contracting and final payment purposes.

Refer to this section's part II. Website Reference for HCE's website address.

- G. Campaign Contributions by State and County Contractors.** Providers are hereby notified of the applicability of HRS Section 11-205.5, which states that campaign contributions are prohibited from specified State or county government contractors during the term of the contract if the contractors are paid with funds appropriated by a legislative body. For more information, FAQs are available at the Campaign Spending Commission webpage. (See part II, Website Reference.)
- H. Confidential Information.** If an applicant believes any portion of a proposal contains information that should be withheld as confidential, the applicant shall request in writing nondisclosure of designated proprietary data to be confidential and provide justification to support confidentiality. Such data shall accompany the proposal, be clearly marked, and shall be readily separable from the proposal to facilitate eventual public inspection of the non-confidential sections of the proposal.

*Note that price is not considered confidential and will not be withheld.*

- I. Confidentiality of Personal Information.** Act 10 relating to personal information was enacted in the 2008 special legislative session. As a result, the Attorney General's General Conditions of Form AG Form 103F, *Confidentiality of Personal Information*, has been amended to include Section 8 regarding protection of the use and disclosure of personal information administered by the agencies and given to third parties.
- J. Proposal Submittal.** All mail-ins shall be postmarked by the United States Postal System (USPS) and received by the State purchasing agency no later than the submittal deadline indicated on the attached Proposal Mail-in and Delivery Information Sheet. All hand deliveries shall be received by the State purchasing agency by the date and time designated on the Proposal Mail-In and Delivery Information Sheet. Proposals shall be rejected when:
- Postmarked after the designated date; or
  - Postmarked by the designated date but not received within 10 days from the submittal deadline; or
  - If hand delivered, received after the designated date and time.

The number of copies required is located on the Proposal Mail-In and Delivery Information Sheet. Deliveries by private mail services such as FEDEX shall be considered hand deliveries and shall be rejected if

received after the submittal deadline. Dated USPS shipping labels are not considered postmarks.

Telefacsimile transmissions, use of electronic mail, or submission of proposals on computer diskettes are not authorized.

## **IX. Discussions with Applicants**

- A. Prior to Submittal Deadline.** Discussions may be conducted with potential applicants to promote understanding of the purchasing agency's requirements.
- B. After Proposal Submittal Deadline -** Discussions may be conducted with applicants whose proposals are determined to be reasonably susceptible of being selected for award, but proposals may be accepted without discussions, in accordance HAR Section 3-143-403.

## **X. Opening of Proposals**

Upon receipt of a proposal by a state purchasing agency at a designated location, proposals, modifications to proposals, and withdrawals of proposals shall be date-stamped, and when possible, time-stamped. All documents so received shall be held in a secure place by the state purchasing agency and not examined for evaluation purposes until the submittal deadline.

Procurement files shall be open to public inspection after a contract has been awarded and executed by all parties.

## **XI. Additional Materials and Documentation**

Upon request from the state purchasing agency, each applicant shall submit any additional materials and documentation reasonably required by the state purchasing agency in its evaluation of the proposals.

## **XII. RFP Amendments**

The State reserves the right to amend this RFP at any time prior to the closing date for the final revised proposals.

## **XIII. Final Revised Proposals**

If requested, final revised proposals shall be submitted in the manner, and by the date and time specified by the state purchasing agency. If a final revised proposal is not submitted, the previous submittal shall be construed as the applicant's best and final offer/proposal. *The applicant shall submit **only** the section(s) of the proposal that are amended, along with the Proposal*

*Application Identification Form (SPO-H-200)*. After final revised proposals are received, final evaluations will be conducted for an award.

#### **XIV. Cancellation of Request for Proposal**

The RFP may be canceled and any or all proposals may be rejected in whole or in part, when it is determined to be in the best interests of the State.

#### **XV. Costs for Proposal Preparation**

Any costs incurred by applicants in preparing or submitting a proposal are the applicants' sole responsibility.

#### **XVI. Provider Participation in Planning**

Provider participation in a state purchasing agency's efforts to plan for or to purchase health and human services prior to the state purchasing agency's release of a RFP, including the sharing of information on community needs, best practices, and providers' resources, shall not disqualify providers from submitting proposals if conducted in accordance with HAR Sections 3-142-202 and 3-142-203.

#### **XVII. Rejection of Proposals**

The State reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the problems involved and comply with the service specifications. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be rejected without further notice.

A proposal may be automatically rejected for any one or more of the following reasons:

- (1) Rejection for failure to cooperate or deal in good faith. (HAR Section 3-141-201)
- (2) Rejection for inadequate accounting system. (HAR Section 3-141-202)
- (3) Late proposals (HAR Section 3-143-603)
- (4) Inadequate response to request for proposals (HAR Section 3-143-609)
- (5) Proposal not responsive (HAR Section 3-143-610(a)(1))
- (6) Applicant not responsible (HAR Section 3-143-610(a)(2))

## **XVIII. Notice of Award**

A statement of findings and decision shall be provided to all applicants by mail upon completion of the evaluation of competitive purchase of service proposals.

Any agreement arising out of this solicitation is subject to the approval of the Department of the Attorney General as to form, and to all further approvals, including the approval of the Governor, required by statute, regulation, rule, order or other directive.

No work is to be undertaken by the awardee prior to the contract commencement date. The State of Hawaii is not liable for any costs incurred prior to the official starting date.

## **XIX. Protests**

Any applicant may file a protest against the awarding of the contract. The Notice of Protest form, SPO-H-801, is available on the SPO website. (See paragraph II, Website Reference.) Only the following matters may be protested:

- (1) A state purchasing agency's failure to follow procedures established by Chapter 103F of the Hawaii Revised Statutes;
- (2) A state purchasing agency's failure to follow any rule established by Chapter 103F of the Hawaii Revised Statutes; and
- (3) A state purchasing agency's failure to follow any procedure, requirement, or evaluation criterion in a request for proposals issued by the state purchasing agency.

The Notice of Protest shall be postmarked by USPS or hand delivered to 1) the head of the state purchasing agency conducting the protested procurement and 2) the procurement officer who is conducting the procurement (as indicated below) within five working days of the postmark of the Notice of Findings and Decision sent to the protestor. Delivery services other than USPS shall be considered hand deliveries and considered submitted on the date of actual receipt by the state purchasing agency.

<b>Head of State Purchasing Agency</b>	<b>Procurement Officer</b>
Name: Lillian B. Koller	Name: Edwin Igarashi
Title: Director	Title: Fiscal Management Officer
Mailing Address: P.O. Box 339 Honolulu, HI 96809-0339	Mailing Address: P.O. Box 339 Honolulu, HI 96809-0339
Business Address: 1390 Miller Street	Business Address: 1390 Miller Street

Honolulu, HI 96813

Honolulu, HI 96813

**XX. Availability of Funds**

The award of a contract and any allowed renewal or extension thereof, is subject to allotments made by the Director of Finance, State of Hawaii, pursuant to HRS Chapter 37, and subject to the availability of State and/or Federal funds.

**XXI. General and Special Conditions of Contract**

The general conditions that will be imposed contractually are on the SPO website. (See paragraph II, Website Reference). Special conditions may also be imposed contractually by the state purchasing agency, as deemed necessary.

**XXII. Cost Principles**

In order to promote uniform purchasing practices among state purchasing agencies procuring health and human services under HRS Chapter 103F, state purchasing agencies will utilize standard cost principles outlined in Form SPO-H-201, which is available on the SPO website (see paragraph II, Website Reference). Nothing in this section shall be construed to create an exemption from any cost principle arising under federal law.



## **Section 2**

# **Service Specifications**

## **Section 2**

### **Service Specifications**

#### **I. Introduction**

##### **A. Overview, purpose or need**

The Department of Human Services (DHS) is the State's lead agency for the federal Child Care and Development Fund (CCDF). The purpose of the CCDF is to increase the availability, affordability, and quality of child care settings.

As an integral member of both the Early Learning Council (ELC) and the State Advisory Council on Early Childhood Education (SAC), the DHS is interested in creating an early learning system that increases access to high quality early learning settings for all children, birth to five years old, in our State. This service is to have an organization assist and support the DHS in making informed decisions to make positive impacts in the early learning system.

Additionally, because many of the discussions and decisions about early childhood education and care that have statewide impact take place on Oahu, the service is to also provide a mechanism for neighbor island residents to engage in discussions, provide input, and receive information about early childhood education and care activities that may affect them.

##### **B. Planning activities conducted in preparation for this RFP**

Planning for this service included an assessment of the existing state contract, discussions with members of the child care community, and posting a Request For Information on July 27, 2010 inviting public input on the planned service.

##### **C. Description of the goals of the service**

The project goal is to provide a sustainable, collaborative, and integrated early childhood system whereby children are safe, healthy and ready to learn by the time they enter the school system.

##### **D. Description of the target population to be served**

This service is targeted to benefit the State of Hawaii's children, ages 0-5 years old, their parents, caregivers, and the communities in which they live.

**E. Geographic coverage of service**

The applicant shall engage in activities that would have statewide benefits.

**F. Probable funding amounts, source, and period of availability**

A maximum amount of \$150,000.00 in federal funding is available for the initial contract period of January 1, 2011 to June 30, 2011. A maximum amount of \$300,000.00 in general and federal funds is allocated for an additional 12-month period, not to exceed June 30, 2012.

The total allocation of funds is subject to a determination of satisfactory performance and the appropriation and availability of funds, and it may be terminated without liability to either the purchasing agency or the provider in the event funds are not appropriated or available.

**II. General Requirements****A. Specific qualifications or requirements, including but not limited to licensure or accreditation**

The applicant shall comply with the Chapter 103F, HRS Cost Principles for Purchases of Health and Human Services identified in SPO-H-201 (Effective 10/1/98), which can be found on the SPO website at

<http://hawaii.gov/spo/spoh/for-private-providers/forms-and-instructions-for-private-providers-applicants/costprinciples.PDF>

**B. Secondary purchaser participation**  
(Refer to HAR Section 3-143-608)

After-the-fact secondary purchases will be allowed.

Planned secondary purchases – None.

**C. Multiple or alternate proposals** **check one**  
(Refer to HAR Section 3-143-605)

☐ Allowed ☒ Unallowed

**D. Single or multiple contracts to be awarded** **check one**  
(Refer to HAR Section 3-143-206)

☒ Single ☐ Multiple ☐ Single & Multiple

Criteria for multiple awards: Not applicable.

**E. Single or multi-term contracts to be awarded** *check one*

(Refer to HAR Section 3-149-302)

☒ Single term (2 years or less)
                         
 ☐ Multi-term (more than 2 years)

Contract terms:

Initial term of contract: January 1, 2011 to June 30, 2011

Length of each extension: 12 months

Number of possible extensions: One (1)

Maximum length of contract : Not to exceed June 30, 2012

The initial period shall commence on the contract start date or Notice to Proceed, whichever is later.

The option to extend the service will be offered in writing by the State. No supplementary agreement shall be binding upon the State until the agreement has been fully and properly executed by all parties thereto prior to the start date of agreement. The provider shall not provide any services until the agreement is fully and properly executed.

**F. RFP contact person**

The individual listed below is the sole point of contact from the date of release of this RFP until the selection of the successful provider(s). Written questions should be submitted to the RFP contact person and received by the day and time specified in Section 1, paragraph I (Procurement Timetable) of this RFP.

Contact person:

Marja Leivo

Phone: (808) 586-7112

Email: mleivo@dhs.hawaii.gov

**III. Scope of Work**

The scope of work encompasses the following tasks and responsibilities:

**A. Service Activities**

(Minimum and/or mandatory tasks and responsibilities)

In order to further the work of the ELC, the SAC, and the DHS, having an organization that can provide data and other types of information would be useful to assist in creating an optimal early learning system. The kinds of information that should be collected and shared includes, but is not limited to, the unique characteristics of communities in each county, the quality activities that are currently in place in the various communities, and the activities that

other states are engaged in that would help to improve outcomes for children in our State.

The type of advocacy work that this service seeks is to increase public awareness of how increased quality in all child care settings improves outcomes for children.

Also, this service seeks to have facilitators in each county to pull together stakeholders in the public and private sectors within the county. The role of the facilitator is to:

- a) Exchange information with their stakeholders about topics that are discussed at the State and County levels in order to solicit input or plan for implementation; and
- b) Continue the momentum in each community that is implementing early learning activities that are unique to that county.

**B. Management Requirements (Minimum and/or mandatory requirements)**

**1. Personnel**

The applicant must describe the organization's capability and experience in performing this service by providing information on all positions to be funded in whole or in part through this project, including a description of experience and education required which reflect that staff have the relevant background needed to conduct child care advocacy and facilitation activities. Include position titles, job descriptions, and qualifications for each position.

**2. Administrative**

The contracted organization, upon request by the State, shall meet with representatives of the State to discuss the progress of the project. The purpose of site visits will be to observe the project set-up and the record-keeping procedures.

**3. Quality assurance and evaluation specifications**

The contracted organization shall be responsible for keeping comprehensive records of all expenditures, available for monitoring by DHS staff or designees. These records shall include, but are not limited to:

- a) Copies of approved purchase orders signed by the appropriate authority;
- b) Copies of invoices, packing slips, receipts, credit/debit memos and other vendor documents;

- c) Other appropriate internal accounting statements and reconciliation schedules.

The contracted organization shall be responsible for keeping comprehensive program records available for monitoring by DHS staff. Monitoring will consist of comparing reported data with applicant's documents used to summarize data. These records shall include, but are not limited to:

- a) Personnel files;
- b) Notes of staff meetings and training; and
- c) Documentation of the various service activities.

Evaluation will consist of comparing projected objectives with outcome performance and analyzing factors producing the results.

#### **4. Output and performance/outcome measurements**

The applicant shall have made progress in meeting the outcomes as indicated in the service activity section (III. A.) above by:

- a) Facilitating and participating in regular meetings with stakeholders from each community to discuss and implement actions that would help them achieve the goals set forth in their community to improve outcomes for children.
- b) Providing DHS and other stakeholders with current information about what other states are doing to accomplish having children safe, healthy, and ready to learn.
- c) Providing DHS and the child care community with data and statistics that show the effectiveness of each community's strategy on improving the status of the children of their community to be safe, healthy, and ready to learn.

#### **5. Experience**

The contracted organization shall have experience in conducting the following activities:

- a) Advocating for public awareness about the positive impacts of early learning for young children;
- b) Facilitating community meetings;
- c) Conducting focus groups;
- d) Developing partnerships between public and private sectors;
- e) Helping to shape public policy; and
- f) Collecting and interpreting data.

**6. Coordination of services**

The contracted organization shall coordinate with public and private organizations, communities, and other partners that can assist in advocacy for early learning for young children.

**7. Reporting requirements for program and fiscal data**

The contracted organization shall submit quarterly reports to the State, no later than 30 calendar days after the end of each quarter, that indicate the progress made towards the outcomes of the service and whether specified timelines are met. The reports shall also include information about how this service is affecting outcomes of young children statewide.

The final summary shall be submitted to the State no later than 30 calendar days after the end of the each fiscal year, and it shall describe the total impact of this service. It shall include information about the status of achieving the overall objective of having children safe, healthy, and ready to learn.

The contracted organization shall also submit monthly expenditure reports for the operation of the program that serve as invoices for reimbursement. The form "Subgrantees invoice and Expenditure Report" (SIER) shall be the official forms used for the contracted organization to request funds for the contract. The final invoice for the service shall be submitted no later than 45 days after the end of each fiscal year.

**C. Facilities**

The contracted organization shall provide a description of its facilities and demonstrate its adequacy in relation to the proposed services. The facilities shall meet the requirements of the Americans with Disabilities Act (ADA), as applicable.

**IV. COMPENSATION AND METHOD OF PAYMENT**

The contracted organization shall comply with the Chapter 103F, HRS Cost Principles for Purchases of Health and Human Services identified in SPO-H-201 (Effective 10/1/98), which can be found on the SPO website at <http://hawaii.gov/spo/spoh/for-private-providers/forms-and-instructions-for-private-providers-applicants/costprinciples.PDF>. Cost principles represent guidelines in determining which types of expenditures will be reimbursed, payment dollar limits, payment policy constraints, and the requirements for verification and documentation. The budget amount for the operation of the project must not exceed the amount stated in the monthly basis after services are rendered. The applicant shall abide by all the Federal regulations as legislated by Public Law 101-508, Omnibus Budget

Reconciliation Act of 1990. Any expenditure made or authorized by the contracted organization that is subsequently determined by the State or Federal government to be unallowable shall be repaid to the State or offset against any other funds to which the applicant may be entitled.

The cost reimbursement pricing structure reflects a purchase arrangement in which the State pays the contracted organization for budgeted costs that are actually incurred in delivering the services specified in the contract, up to a stated maximum obligation.

The purchasing agency shall consider cost proposals based on “cost type” or “pure reimbursement” pricing structures from the contract organizations that are non-profit organizations licensed to do business in the State of Hawaii. “Cost type” involves payment of all incurred costs within a predetermined total estimated cost.

The purchasing agency shall also consider cost proposals based on “cost-plus-fixed-fee” from contracted organizations that are for-profit organizations licensed to do business in the State of Hawaii. “Cost-plus-fixed-fee” allows for payment of all incurred costs within a predetermined amount plus an agreed upon fee which will not change. **We anticipate these fees to be limited to 10% or less of the contract award. Also, these fees need to be built within the contract ceiling.** Please note, however, that the DHS reserves the right to negotiate the final amount of fixed fee within the limits discussed above.

**No more than 5 percent of the aggregate amount of funds available may be expended for administrative costs in each fiscal year. Note that the term “administrative costs” do not include the costs of providing direct services.**

The purchasing agency shall select the applicable cost proposals subject to the legal standing of the organization, e.g., non-profit or for-profit, and that are in the best interest of the State.

Payments shall be made monthly by the State upon receipt of the monthly SIER for reimbursement and program report. No advance payments are available.



## **Section 3**

# **Proposal Application Instructions**

## Section 3

# Proposal Application Instructions

### General instructions for completing applications:

- *Proposal Applications shall be submitted to the state purchasing agency using the prescribed format outlined in this section.*
- *The numerical outline for the application, the titles/subtitles, and the applicant organization and RFP identification information on the top right hand corner of each page should be retained. The instructions for each section however may be omitted.*
- *Page numbering of the Proposal Application should be consecutive, beginning with page one and continuing through for each section. See sample table of contents in Section 5.*
- *Proposals may be submitted in a three ring binder (Optional).*
- *Tabbing of sections (Recommended).*
- *Applicants must also include a Table of Contents with the Proposal Application. A sample format is reflected in Section 5, Attachment B of this RFP.*
- *A written response is required for **each** item unless indicated otherwise. Failure to answer any of the items will impact upon an applicant's score.*
- *Applicants are **strongly** encouraged to review evaluation criteria in Section 4, Proposal Evaluation when completing the proposal.*
- *This form (SPO-H-200A) is available on the SPO website (see Section 1, paragraph II, Website Reference). However, the form will not include items specific to each RFP. If using the website form, the applicant must include all items listed in this section.*

### The Proposal Application comprises the following sections:

- *Proposal Application Identification Form*
- *Table of Contents*
- *Program Overview*
- *Experience and Capability*
- *Project Organization and Staffing*
- *Service Delivery*
- *Financial*
- *Other*

### **I. Program Overview**

Applicant shall give a brief overview to orient evaluators as to the program/services being offered.

## **II. Experience and Capability**

### **A. Necessary Skills**

The applicant shall demonstrate that it has the necessary skills, abilities, and knowledge relating to the delivery of the proposed services.

### **B. Experience**

The applicant shall provide a description of projects/contracts pertinent to the proposed services. This should include letters of support or other evidence of:

- a) Developing partnerships between public and private sectors;
- b) Helping to shape public policy;
- c) Facilitation of focus groups;
- d) Knowledge of early childhood education and care; and
- e) Experience in data collection.

### **C. Quality Assurance and Evaluation**

The applicant shall describe its own plans for quality assurance and evaluation for the proposed services, including methodology.

### **D. Coordination of Services**

The applicant shall demonstrate the capability to coordinate services with other agencies and resources in the community. The following information shall be included:

- a) Name and contact information for the agency;
- b) Nature of the coordination activities; and
- c) How this relationship is relevant to the proposed services in this RFP.

The State reserves the right to contact each agency named to confirm the information presented.

### **E. Facilities**

The applicant shall provide a description of the facilities that are proposed to be used, and demonstrate its adequacy in relation to the proposed services. If facilities are not presently available, describe plans to secure facilities. Also describe how the facilities meet ADA requirements, as applicable, and special equipment that may be required for the services.

### **III. Project Organization and Staffing**

#### **A. Staffing**

##### **1. Proposed Staffing**

The applicant shall describe the proposed staffing pattern appropriate for the viability of the services. (Refer to the personnel requirements in the Service Specifications, as applicable.)

The applicant shall also include information of how the services will continue to be provided when there are staff vacancies or prolonged absences.

##### **2. Staff Qualifications**

The applicant shall provide the minimum qualifications (including experience) for staff assigned to the program. (Refer to the qualifications in the Service Specifications, as applicable)

#### **B. Project Organization**

##### **1. Supervision and Training**

The applicant shall describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.

##### **2. Organization Chart**

The applicant shall reflect the position of each staff and line of responsibility/supervision. (Include position title, name and full time equivalency) Both the "Organization-wide" and "Program" organization charts shall be attached to the Proposal Application.

### **IV. Service Delivery**

Applicant shall include a detailed discussion of the applicant's approach to applicable service activities and management requirements from Section 2, Item III. - Scope of Work, including (if indicated) a work plan of all service activities and tasks to be completed, related work assignments/responsibilities and timelines/schedules.

The applicant shall include how they plan to meet the needs of the DHS, ELC, and SAC with data information. A detailed explanation shall include how the applicant will determine what the data needs are and how the data will be collected.

The applicant shall include detailed information about the facilitation activities that they plan to engage in within each county. The information shall include, but is not

limited to, the types of facilitation activities that will be conducted, determination of who the stakeholder group should include, the frequency of facilitation activities, and how information from county stakeholders will be communicated to decision-makers.

Detailed information about the advocacy work shall include how the applicant plans to increase public awareness of how early learning improves outcomes for young children.

## V. Financial

### A. Pricing Structure

Applicant shall submit a cost proposal utilizing the pricing structure designated by the state purchasing agency. The cost proposal shall be attached to the Proposal Application.

#### **Pricing Structure Based on Cost Reimbursement**

The cost reimbursement pricing structure reflects a purchase arrangement in which the State pays the contracted organization for budgeted costs that are actually incurred in delivering the services specified in the contract, up to a stated maximum obligation.

The purchasing agency shall consider cost proposals based on “cost type” or “pure reimbursement” pricing structures from the contract organizations that are non-profit organizations licensed to do business in the State of Hawaii. “Cost type” involves payment of all incurred costs within a predetermined total estimated cost.

The purchasing agency shall also consider cost proposals based on “cost-plus-fixed-fee” from contracted organizations that are for-profit organizations licensed to do business in the State of Hawaii. “Cost-plus-fixed-fee” allows for payment of all incurred costs within a predetermined amount plus an agreed upon fee which will not change. **We anticipate these fees to be limited to 10% or less of the contract award. Also, these fees need to be built within the contract ceiling.** Please note, however, that the DHS reserves the right to negotiate the final amount of fixed fee within the limits discussed above.

**No more than 5 percent of the aggregate amount of funds available may be expended for administrative costs in each fiscal year. Note that the term “administrative costs” do not include the costs of providing direct services.**

The purchasing agency shall select the applicable cost proposals subject to the legal standing of the organization, e.g., non-profit or for-profit, and that are in the best interest of the State.

All budget forms, instructions and samples are located on the SPO website (see Section 1, paragraph II Websites referred to in this RFP). The following budget form(s) shall be submitted with the Proposal Application:

SPO-H-205	Budget
SPO-H-206A	Budget Justification – Personnel: Salaries & Wages
SPO-H-206B	Budget Justification – Personnel: Payroll Taxes, Assessment & Fringe Benefits
SPO-H-206C	Budget Justification – Travel – Inter-Island
SPO-H-206E	Budget Justification – Contractual Services: Administrative
SPO-H-206F	Budget Justification – Contractual Services: Sub-contracts
SPO-H-206G	Budget Justification – Depreciation
SPO-H-206H	Budget Justification – Program Activities
SPO-H-206I	Budget Justification – Equipment Purchases

## **B. Other Financial Related Materials**

### **Accounting System**

In order to determine the adequacy of the applicant's accounting system as described under the administrative rules, the following documents are requested as part of the Proposal Application (may be attached):

1. The applicant is to submit the organization's financial statements.
2. The applicant is to submit a copy of the organization's financial policies that relate to the expenditure of funds for this service.

## **VI. Other**

### **A. Litigation**

The applicant shall disclose any pending litigation to which they are a party, including the disclosure of any outstanding judgment. If applicable, please explain.

# **Section 4**

## **Proposal Evaluation**

## Section 4

# Proposal Evaluation

### I. Introduction

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly and impartially. Structural, quantitative scoring techniques will be utilized to maximize the objectivity of the evaluation.

### II. Evaluation Process

The procurement officer or an evaluation committee of designated reviewers selected by the head of the state purchasing agency or procurement officer shall review and evaluate proposals. When an evaluation committee is utilized, the committee will be comprised of individuals with experience in, knowledge of, and program responsibility for program service and financing.

The evaluation will be conducted in three phases as follows:

- Phase 1 - Evaluation of Proposal Requirements
- Phase 2 - Evaluation of Proposal Application
- Phase 3 - Recommendation for Award

#### Evaluation Categories and Thresholds

<u>Evaluation Categories</u>		<u>Possible Points</u>
<i>Administrative Requirements</i>		
<i>Proposal Application</i>		<b>100 Points</b>
Program Overview	0 points	
Experience and Capability	20 points	
Project Organization and Staffing	15 points	
Service Delivery	55 points	
Financial	10 Points	
<b>TOTAL POSSIBLE POINTS</b>		<b>100 Points</b>

### III. Evaluation Criteria

#### A. Phase 1 - Evaluation of Proposal Requirements

##### 1. Administrative Requirements



## 2. Proposal Application Requirements

- Proposal Application Identification Form (Form SPO-H-200)
- Table of Contents
- Program Overview
- Experience and Capability
- Project Organization and Staffing
- Service Delivery
- Financial (All required forms and documents)
- Program Specific Requirements (as applicable)

### B. Phase 2 - Evaluation of Proposal Application (100 Points)

Each section below shall be evaluated using the following criteria:

Weighted points (0-5; 0 being the lowest points and 5 being the highest points allotted) for each sub-area will be given. The sum of weighted points given by the evaluators in all areas of each section will be divided by the maximum weighted points that could be allotted for that area. This quotient will be multiplied by the points assigned to each area, which is noted in parenthesis. The product will be the score for that area.

***Program Overview:*** No points are assigned to Program Overview. The intent is to give the applicant an opportunity orient evaluators as to the service(s) being offered.

#### 1. *Experience and Capability (20 Points)*

The State will evaluate the applicant's experience and capability relevant to the proposal contract, which shall include:

##### A. Necessary Skills

- Demonstrated skills, abilities, and knowledge relating to the delivery of the proposed services.

\_\_\_\_\_

##### B. Experience

- Description of experiences is relevant to the proposed services.

\_\_\_\_\_

**C. Quality Assurance and Evaluation**

- There is a detailed plan for determining the efficacy of the facilitators. \_\_\_\_\_
- There is a detailed plan for determining the efficacy of advocacy work. \_\_\_\_\_
- There is a detailed plan for determining that the support provided to the DHS, ELC, and SAC is sufficient and appropriate. \_\_\_\_\_

**D. Coordination of Services**

- Demonstrated capability to coordinate services with other agencies and resources in the community. \_\_\_\_\_

**E. Facilities**

- Adequacy of facilities relative to the proposed services. \_\_\_\_\_

**2. Project Organization and Staffing (15 Points)**

The State will evaluate the applicant's overall staffing approach to the service that shall include:

**A. Staffing**

- Proposed Staffing: That the proposed staffing pattern is reasonable to insure viability of the services. \_\_\_\_\_
- Staff Qualifications: Minimum qualifications (including experience) for staff assigned to the program are reasonable to insure quality services are provided. \_\_\_\_\_

**B. Project Organization**

- Supervision and Training: Demonstrated ability to supervise, train and provide administrative direction to staff relative to the delivery of the proposed services. \_\_\_\_\_
- Organization Chart: Approach and rationale for the structure, functions, and staffing of the proposed organization for the overall service activity and tasks. \_\_\_\_\_

**3. Service Delivery (55 Points)**

*Evaluation criteria for this section will assess the applicant's approach to the service activities and management requirements outlined in the Proposal Application.*

- Services throughout the contract period are clearly described, including major milestones in delivery of services. \_\_\_\_\_
- Timelines and schedules for delivery of services are realistic. \_\_\_\_\_
- Extent to which there is management oversight of the project, including clarity of work assignments and responsibilities. \_\_\_\_\_
- Proposal clearly describes a reasonable method to be used to keep all stakeholders informed. \_\_\_\_\_
- Proposal clearly describes an understanding of who the stakeholders are in each county. \_\_\_\_\_
- Proposal clearly describes a reasonable method to advocate for public awareness of early learning for improved outcomes for young children. \_\_\_\_\_
- Proposal clearly describes an understanding of the data needs that will support the work of the DHS, ELC, and SAC. \_\_\_\_\_
- Proposal clearly describes an understanding of the sources of data that can be utilized and how it would be gathered. \_\_\_\_\_

**4. Financial (10 Points)**

- Personnel costs are reasonable and comparable to positions in the community. \_\_\_\_\_
- Non-personnel costs are reasonable and adequately justified. \_\_\_\_\_
- The proposed budget supports the scope of service and requirements of the RFP. \_\_\_\_\_
- The financial policies for the use of funds for this project are reasonable and adequate. \_\_\_\_\_

**C. Phase 3 - Recommendation for Award**

Each notice of award shall contain a statement of findings and decision for the award or non-award of the contract to each applicant.

# **Section 5**

## **Attachments**

- A. Proposal Application Checklist**
- B. Sample Table of Contents**

## **Attachment A**

### **Proposal Application Checklist**

## Proposal Application Checklist

Applicant: \_\_\_\_\_

RFP No.: \_\_\_\_\_

The applicant's proposal must contain the following components in the order shown below. This checklist must be signed, dated and returned to the purchasing agency as part of the Proposal Application. SPOH forms are on the SPO website. See Section 1, paragraph II Website Reference.\*

Item	Reference in RFP	Format/Instructions Provided	Required by Purchasing Agency	Completed by Applicant
<b>General:</b>				
Proposal Application Identification Form (SPO-H-200)	Section 1, RFP	SPO Website*	X	
Proposal Application Checklist	Section 1, RFP	Attachment A	X	
Table of Contents	Section 5, RFP	Section 5, RFP	X	
Proposal Application (SPO-H-200A)	Section 3, RFP	SPO Website*	X	
Tax Clearance Certificate (Form A-6)	Section 1, RFP	Dept. of Taxation Website (Link on SPO website)*		
Cost Proposal (Budget)				
SPO-H-205	Section 3, RFP	SPO Website*	X	
SPO-H-205A	Section 3, RFP	SPO Website* Special Instructions are in Section 5		
SPO-H-205B	Section 3, RFP,	SPO Website* Special Instructions are in Section 5		
SPO-H-206A	Section 3, RFP	SPO Website*	X	
SPO-H-206B	Section 3, RFP	SPO Website*	X	
SPO-H-206C	Section 3, RFP	SPO Website*	X	
SPO-H-206D	Section 3, RFP	SPO Website*		
SPO-H-206E	Section 3, RFP	SPO Website*	X	
SPO-H-206F	Section 3, RFP	SPO Website*	X	
SPO-H-206G	Section 3, RFP	SPO Website*	X	
SPO-H-206H	Section 3, RFP	SPO Website*	X	
SPO-H-206I	Section 3, RFP	SPO Website*	X	
SPO-H-206J	Section 3, RFP	SPO Website*		
<b>Certifications:</b>				
<i>Federal Certifications</i>		Section 5, RFP		
Debarment & Suspension		Section 5, RFP		
Drug Free Workplace		Section 5, RFP		
Lobbying		Section 5, RFP		
Program Fraud Civil Remedies Act		Section 5, RFP		
Environmental Tobacco Smoke		Section 5, RFP		
<b>Program Specific Requirements:</b>				
Organizational Chart(s)			X	
Financial Policies			X	

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## **Attachment B**

### **Sample Table of Contents**

## Proposal Application Table of Contents

<b>I.</b>	<b>Program Overview.....</b>	<b>1</b>
<b>II.</b>	<b>Experience and Capability .....</b>	<b>1</b>
	<b>A.</b> Necessary Skills .....	2
	<b>B.</b> Experience .....	4
	<b>C.</b> Quality Assurance and Evaluation.....	5
	<b>D.</b> Coordination of Services .....	6
	<b>E.</b> Facilities.....	6
<b>III.</b>	<b>Project Organization and Staffing .....</b>	<b>7</b>
	<b>A.</b> Staffing .....	7
	1. Proposed Staffing.....	7
	2. Staff Qualifications .....	9
	<b>B.</b> Project Organization .....	10
	1. Supervision and Training.....	10
	2. Organization Chart (Program & Organization-wide) (See Attachments for Organization Charts)	
<b>IV.</b>	<b>Service Delivery .....</b>	<b>12</b>
<b>V.</b>	<b>Financial .....</b>	<b>20</b>
	See Attachments for Cost Proposal	
<b>VI.</b>	<b>Litigation .....</b>	<b>20</b>
<b>VII.</b>	<b>Attachments</b>	
	<b>A.</b> Cost Proposal	
	SPO-H-205 Proposal Budget	
	SPO-H-206A Budget Justification - Personnel: Salaries & Wages	
	SPO-H-206B Budget Justification - Personnel: Payroll Taxes and Assessments, and Fringe Benefits	
	SPO-H-206C Budget Justification - Travel: Interisland	
	SPO-H-206E Budget Justification - Contractual Services – Administrative	
	<b>B.</b> Other Financial Related Materials	
	Financial Audit for fiscal year ended June 30, 1996	
	<b>C.</b> Organization Chart	
	Program	
	Organization-wide	
	<b>D.</b> Performance and Output Measurement Tables	
	Table A	
	Table B	
	Table C	
	<b>E.</b> Program Specific Requirement	



